Technical Assistance Exchange Newsletter
October 7, 2009

A Weekly Update for Aging & Disability Resource Center and Community Living Programs and their Partners

Contact Steve Baxter at The Lewin Group with questions about this newsletter: steve.baxter@lewin.com or 703.269.5554

Please visit the ADRC-TAE website for a text version of this newsletter.

October is Reporting Month!

ADRC and CLP grantees are expected to report program information in October for project activities from April to September 2009. Reports are due at the end of October. This information is critical for tracking program success and making the case for project sustainability at the Federal level.

The TAE will be offering separate trainings to ADRC and CLP grantees on reporting requirements and tools. (See article at right for full details.)

Monitor the TAE website for updates, or contact your state TA lead with any questions.

Thank you!

OCC Releases Consumer Advisory: "Reverse Mortgages: Are They for You?"

The Office of the Comptroller of the Currency (OCC) recently issued a consumer advisory to help people better understand reverse mortgages. Reverse mortgages generally are available to consumers who are 62 or older, and can be used to supplement retirement income or meet health care or other financial needs.

The information developed for consumers discusses basic facts about reverse mortgages, which are complex, home-secured loans. Under a reverse mortgage, a consumer receives payments from the lender - either over time or all at once - based on the value of the home at the time of the loan. As the consumer receives payments, and interest and fees accrue, these amounts are added to the loan balance. The advisory also reviews the costs and benefits of reverse mortgages.

In addition, the OCC's consumer advisory provides basic "rules of thumb" for consumers who are considering a reverse mortgage -- the advisory urges consumers to (1) investigate other alternatives in addition to reverse mortgages, (2) remember that reverse mortgages generally make more sense the longer the consumer remains in the home, and (3) be wary of anyone trying to sell other products along with a reverse mortgage.

The OCC urges consumers to consult with a qualified, independent housing counselor before entering into a reverse mortgage, and explains how consumers may obtain additional information about reverse mortgages.

The fact sheet "Reverse Mortgages: Are They for You?" is available on the Housing page on the TAE website.

Registration is now open for the 2009 FMS Workshop

Biennial Participant Direction Financial Management Services (FMS) Workshop

Presented by the National Resource Center for Participant-Directed Services (NRCPDS)

When: November 16-17, 2009
Where: Baltimore, MD

To register, please complete the form on the NRCPDS website.

:: adrc-tae@lewin.com ::

:: www.adrc-tae.org ::

Recent Website Additions

Call Notes from Care Transitions Workgroup on 9-30-2009
These call notes summarize the dialogue that took place during a teleconference meeting of a Care Transitions workgroup. Texas and Florida shared information about their experiences implementing care transitions programs through CLP, and others on the call discussed targeting and assessment.

AoA Press Release Announcing 2009 ADRC and CLP Grantees
This press release from the Administration on Aging describes 2009 grant awards totaling more than $32 million to strengthen the ability of states and organizations to provide home and community-based services for older adults and people with disabilities. Aging and Disability Resource Center, Community Living Program, and other grants are described.

"Advancing Access to Medicaid HCBS" Brief
The Kaiser Commission on Medicaid and the Uninsured wrote this brief to examine issues and challenges facing Medicaid home and community-based services with the goal of helping stakeholders increase access.

Retaining Benefits: An Important Aspect of Increasing Enrollment
From the National Center for Benefits Outreach and Enrollment, this Issue Brief provides information on how to retain benefits for clients and preventing them from cycling on and off benefits.

Upcoming Technical Assistance Events

ADRC Monthly TA Call for October: Semi-Annual Reporting Tool (SART) Training

This call will provide instructions and review of the process for accessing, filling out and submitting the Semi-Annual Reporting Tool on the TAE website for narrative information and completing the Excel Entry Tool for quantitative information. The online SART will become available on October 1 and will be due on October 30. The Excel Entry Tool will become available on October 8 and will also be due on October 30. *The intended audience for this call are ADRC grantees who have not used the Semi-Annual Reporting Tool before or who would like a refresher, and CMS 2008 Real Choice Systems Change Grantees.*

- Thursday, October 8, 2009
- 2:30-4:00 PM EST
- Toll-Free Teleconference Line: (800) 260-0718
- Participant Access Code: 116876 - please reference "ADRC Monthly TA Call" when prompted by operator
- Register for the webinar here.
- Additional information and call materials will be posted on the Monthly Call page as they become available.

Community Living Program Monthly Grantee TA Call:
Data Reporting and Welcome to New Grantees

This call will provide instructions for the new CLP Reporting Tool, which will be available on the TAE website. The call is your opportunity to receive training and ask questions. The CLP Reporting Tool is important for collecting program data, new enrollee information, and participant information.

- Wednesday, October 14, 2009
- 2:00-3:30 PM EST
- Toll-Free Teleconference Line: (800) 260-0702
- Participant Access Code: 11688
- Please reference "CLP Monthly TA Call" when prompted by operator
- Register for the webinar here.
- Additional information and call materials will be posted on the Monthly Call page as they become available.

Upcoming Technical Assistance Online Training

For a detailed description of all TAE trainings, including instructor biographies and presentation materials, please visit the Training Section of the TAE website.

Overview of ADRCs for Centers for Independent Living

The ADRC initiative is part of a nationwide effort to restructure services and supports for older adults and persons with disabilities and it complements other long term care system change activities designed to enhance access to community living. The goal of the ADRC program is to empower individuals to make informed choices and to streamline access to long-term support. It is crucial that the Independent Living community be involved in the development of ADRCs. This training is an introductory course

that provides an overview of the purpose, goals and activities of Aging and Disability Resource Centers (ADRCs) from the Independent Living perspective. It details common challenges faced by CILs and SILCs in engaging in ADRC development and offers concrete solutions.

Audience: This course is designed and intended for Centers for Independent Living and Statewide Independent Living Councils who are not already involved in ADRCs.

- Date: Thursday, October 15th, 2009
- Time: 3:00 - 4:30pm, EST
- Note: NCIL will be hosting this training and providing logistics.
- Register for the training via the NCIL website.

Overview of Aging and Disability Resource Center Program

The Aging and Disability Resource Center (ADRC) initiative is part of a nationwide effort to restructure services and supports for older adults and persons with disabilities. ADRCs complement other long-term care systems change activities designed to enhance access to community resources and supports. The goal of the ADRC program is to empower individuals to make informed choices and to streamline access to long-term support. This training is an introductory course that provides an overview of the purpose, goals and activities of ADRCs by detailing the required functions of ADRC's, specifically Awareness, Assistance and Access. The content of the course is built upon lessons learned from the first five years of the ADRC demonstration grant program that began in 2003.

Audience: This course was designed and intended for new ADRC or Single Entry Point staff, advisory board members and volunteers.

- Date: Wednesday, October 28th, 2009
- Time: 2:30 - 4:00pm, EST
- Register for the webinar (Required)

- Toll-Free Teleconference Number: (800) 230-1059

For a more detailed description of all TAE trainings, including instructor biographies and presentation materials, please visit the Training Section of the TAE website.